

Alaska Salmon Marketing Workshop

**Presented by
Department of Community & Economic Development
University of Alaska – Fairbanks
Sponsored by USDA
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The Presenters

- Glenn Haight -- Department of Community & Economic Development, Division of Community & Business Development
- Pat Shanahan, Shanahan Strategic Planning & Communications
- Chris Mitchell, Seafood Market Developers
- Quentin Fong -- Fishery Industrial Technology Center

Alaska's triple-whammy

- Declining prices
- Disappearing markets
- Increasing costs

This segment of the workshop was presented by Chris Mitchell. For further information, please contact him at:

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Is Farmed Salmon to blame?

- Has set new quality standards
- Standards we have ignored
- Farmed salmon has no surprises
- Increasing salmon consumption

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Why markets like farmed salmon

- Year-round availability
- Fresh year-round
- Consistent species and size grading
- Consistent flesh characteristics
- Low shrinkage
- Consistent and declining prices
- Market-driven production
- Financing considerations

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Why the market no longer favors Alaska salmon

- Inconsistent supply
- Uncertain pricing
- Inconsistent quality
- High shrinkage
- Producer-driven production

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Why markets like the quality of farmed salmon

- Appearance -- bright, no scale loss
- Flavor – mild and some customers like this
- Color – consistent
- Texture – uniform
- Freshness – fresh 52 weeks a year

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Causes of quality loss

- Bacteria growth
- Enzyme degradation
- Physical damage
- Dehydration
- Contamination

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**Buying and dealing with farmed
salmon is easy.
Buying and dealing with Alaska
salmon is not.**

Why is that?

Why is that?

- Farmed salmon has eliminated all the negatives
 - Uniform pricing
 - Year round availability
 - Consistency
- Alaska salmon quality is inconsistent
- Alaska is still trying to “sell the pack”

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The Alaskan Way

- Processors buy the entire catch
- Processes all qualities the same way with old technologies
- Alaska sets the specs – not the market
- Prefer to export H&G or canned to large volume buyers
- We sell by the truckload
- Sell it and forget it!
- Poorly trained process workers

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The Alaskan Way worked adequately
prior to competition.

If buyers wanted salmon:

- it came from Alaska
- it was purchased, processed and sold to Alaskan specifications
- at prices set by the Alaska industry – not the market

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**It's a new day, a new business.
Now we need to ask ourselves.....**

*What is expected of Alaska fishermen
and processors
that was not expected before?*

Groups who handle quality differently

- Triad Fisheries
- The Copper River salmon industry
- Arctic Keta[®] producers
- Others (Cook Inlet, SE troll producers)

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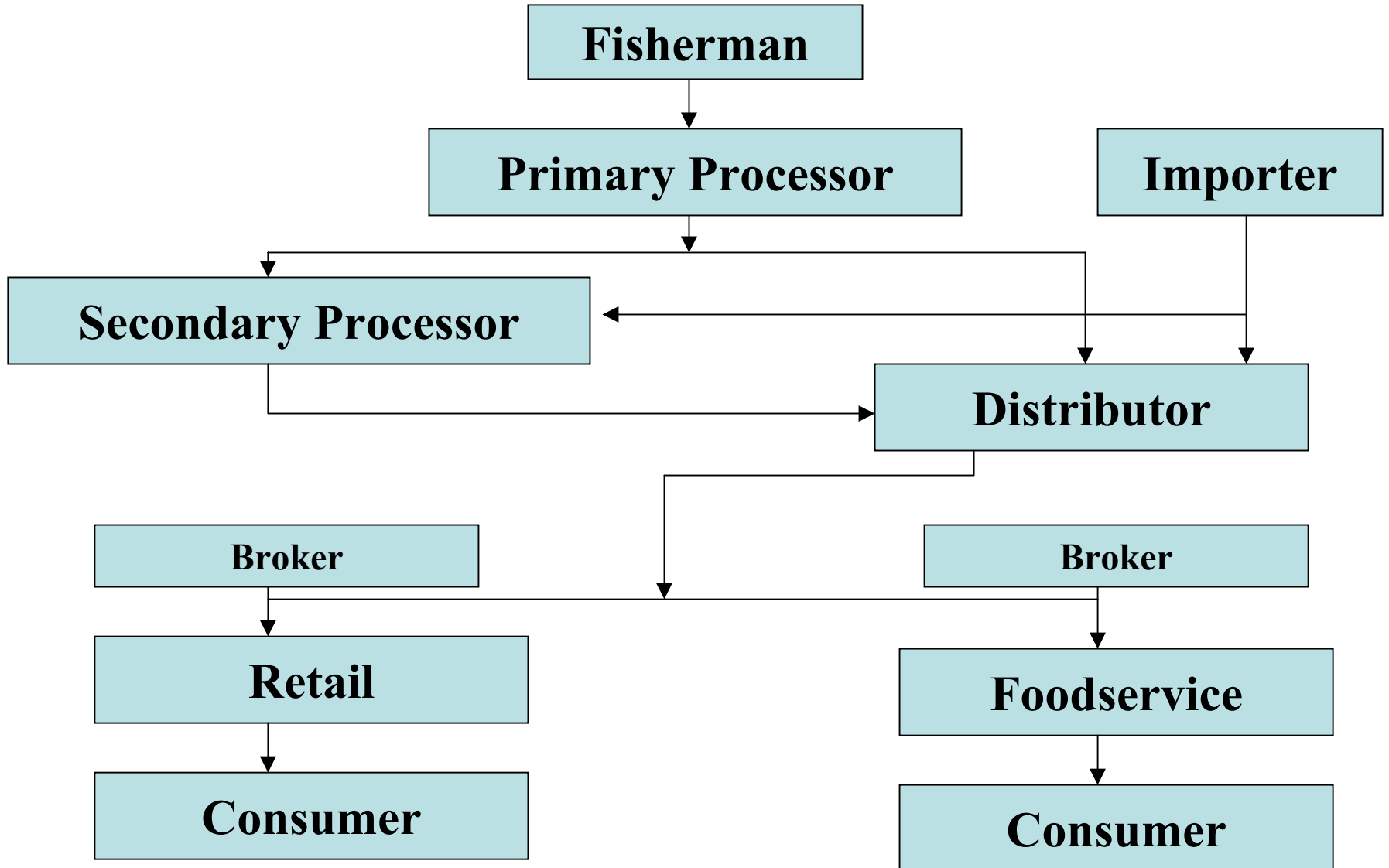
Common threads among these leaders

- Fisherman and processor handling guidelines
- Based upon ASMI quality guidelines
- 3rd party inspection and verification
- Branding

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Ocean to Oven



- Processor → Distributor: 15%
- Distributor → Foodservice/Retail 15-25%
- Broker Commission 3-5%
- Foodservice/Retail → Consumers 40+%

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Fisherman Direct Marketing

- Selling to a higher point in the distribution chain
- Direct marketing is a hot concept. Why?
- Problems/concerns with direct marketing
- New responsibilities come along with new opportunities
- Finding new buyers and convincing them to purchase
- Additional demands of value-added production

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Is Direct Marketing for You?

Test yourself

- Paperwork, bookkeeping and details
- Sales
- Waiting for your money
- Same old same old, week after week
- The physical effort
- Supportive family?
- Commitment of time and capital

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Why Most Direct Marketing Efforts Fail

- Lack of planning and discipline
- Lack of capital
- Doing it all is difficult
- Inadequate attention to quality & customer specs
- Inadequate attention to marketing
- Failure to adequately review risk
- Failure to use all resources available

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A Success Story

Triad Fisheries and Bruce Gore

Ways in which business is conducted.....

- Proprietorship
- Partnership
- Corporation
- Cooperative

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What is a coop?

A business voluntarily controlled, operated at cost, which is owned, capitalized and controlled by member-patrons, sharing risks and benefits proportional to their participation.

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Cooperative Principles

- Open membership
- Democratic control
- Limited return on capital
- Net surplus belongs to the owners
- Continuous education
- Cooperation among cooperatives
- Politically non-partisan
- Members earn only from the sale of his/her own products

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Types of Cooperatives

- Consumer coops
- Worker coops
- Producer coops

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Examples of Well Known Cooperatives

- Blue Diamond
- Land O' Lakes
- Group Health
- Yellow Cab
- REI
- Ocean Spray
- Sunkist
- SPC

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Trade/Producer Associations

- Produce Marketing Association
- Maverick Ranch Producers Alliance

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The Game

Marketing Concepts



Gear Type



Cultural



Species
Specific



Regional

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Gear Type

- Emphasizes the unique nature of how fish is caught - usually has a quality component
 - Example: troll caught, instant bled & gutted, flash freeze
- Current examples:
 - SE Trollers
- Gear must be tied to or contribute to the quality

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Species Specific

Emphasizes the unique nature of the fish species along with its flavor and aesthetic attributes

- Chums - firm, pink flesh, moderate fat content
- Pinks - firm, light rose-colored flesh, fine texture, delicate flavor
- Coho - orange-red, firm texture, delicate flavor, relatively lean
- Sockeye - deep, red flesh, fat fish, firm flesh, full - delectable flavor
- Chinook - large size, high fat content

Examples include:

- Arctic Keta
- Copper River Reds

Keta
Sea trout
Silver
Reds
Kings



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Regional Plans

Emphasizes the unique nature of the area the fish live in

- Pristine waters/isolated from human impact
- Raised in pure mountain streams surrounded by lush rain forests

Examples include:

- Arctic Keta
- Copper River
- Cook Inlet
- Organic (statewide)



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Cultural Identification

Emphasizes the unique nature of the people who catch and process the fish

- Native heritage - fishing for thousands of years
- Rugged individualists surviving the elements to bring consumers worldwide
- Way of life - 'Thousands of "Mom and Pops"' in the world of multinational conglomerates

Examples include:

- Arctic Keta



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What is Our Product?

- Traditional commodity
- Value-added commodity
- Value-added branded product

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Niche Marketing

- Most marketing today is niche marketing
- Alaska has been “niched”
- Generic product niche: Wild, natural, sustainable

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Niche Marketing

- End user
- Distribution level
- Customer size
- Service
- Geographic

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Market Identification

- The right size for your operation
- Should match your ability to source and service

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Market Demand

- What does the market want?
- What needs are not being fulfilled?
- Is there market demand for what we want to produce?
- What is current pricing?

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Market Research

- The most important phase of any marketing
- Doesn't always have to be formal
- Visit, look and listen
- Be ready to hear what the market is telling you

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Sources of Supply

- Consistency is the key in the marketplace
- Need to come up with creative solutions for wild harvest fluctuations

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Product Packaging

- What does the market demand?
- How can packaging add value to the product?
- What are the best in the business doing?

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Value – Added Product Development

- Must be customer-driven
- Don't test on your customers
- In order to be successful it has to offer something more or different than what is already out there.

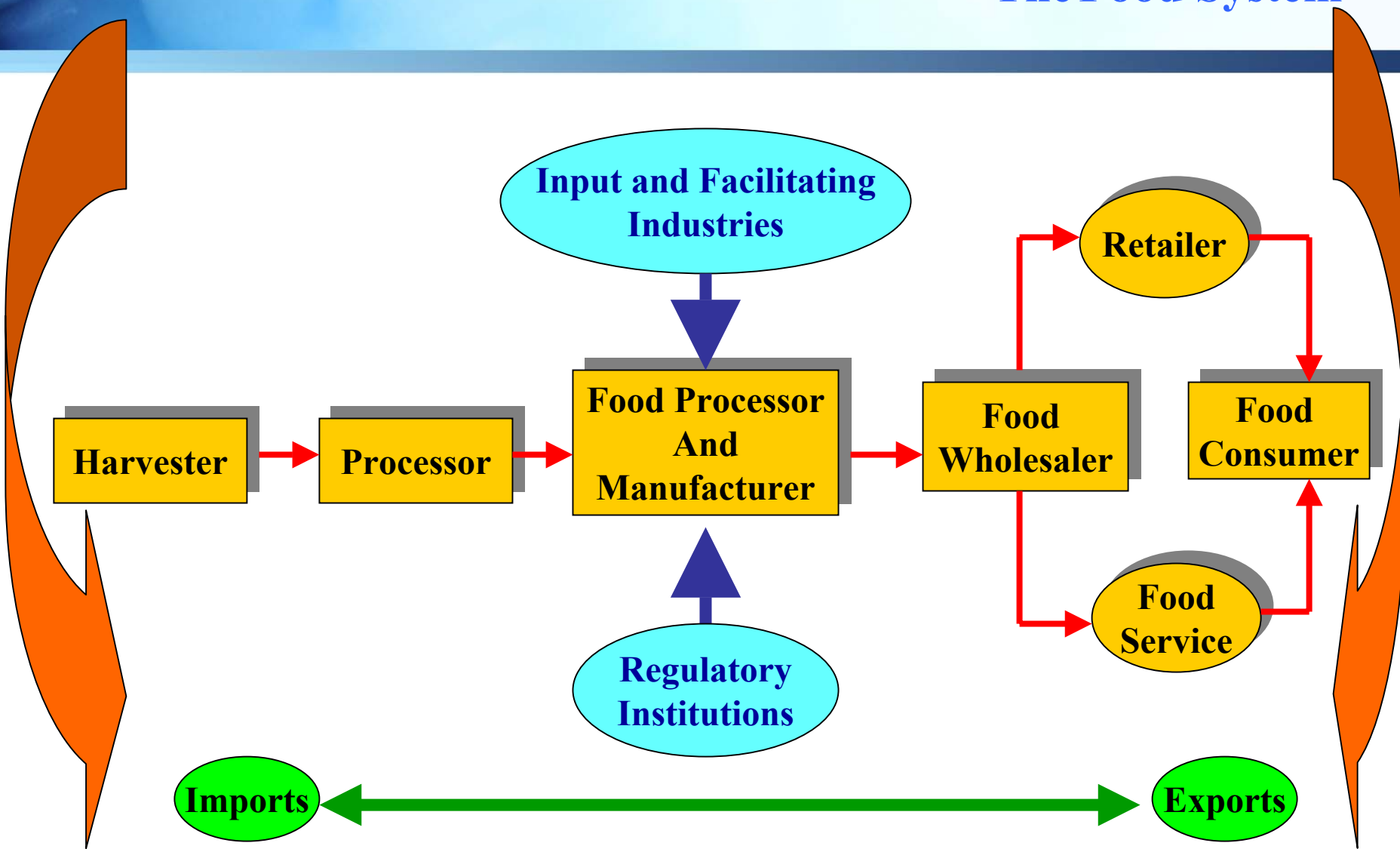
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The Game

Choose Product and Marketing Scheme

The Food System



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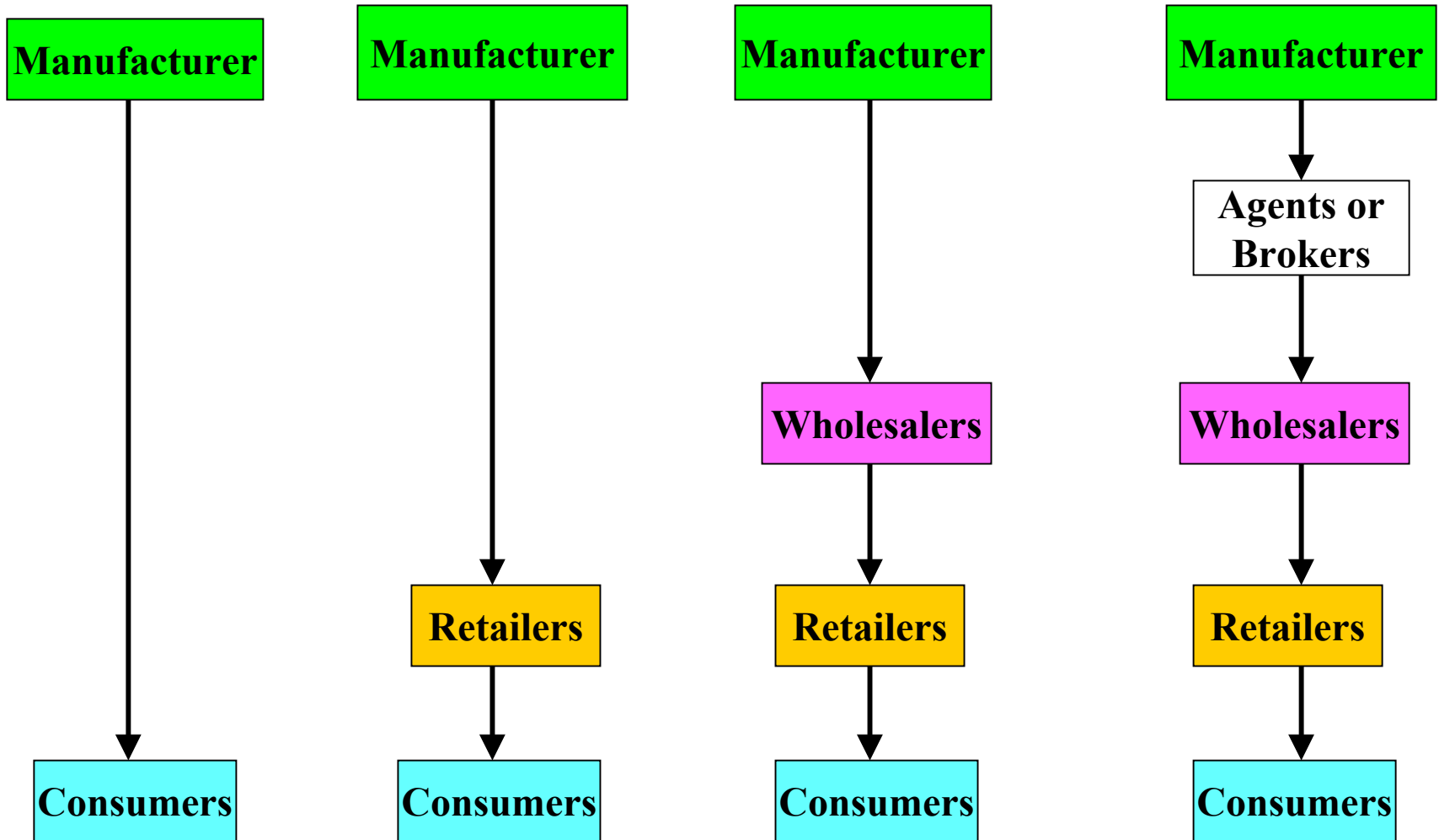
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Classical Views of Marketing Intermediaries

- Trade is only suitable for those weakest in the body and unfit for any other work – Plato
- All retail dealing may be described as dishonest for the dealer will gain nothing except by profuse lying and nothing is more disgraceful than untruthful huckstering - Cicero

Examples of Marketing Channels



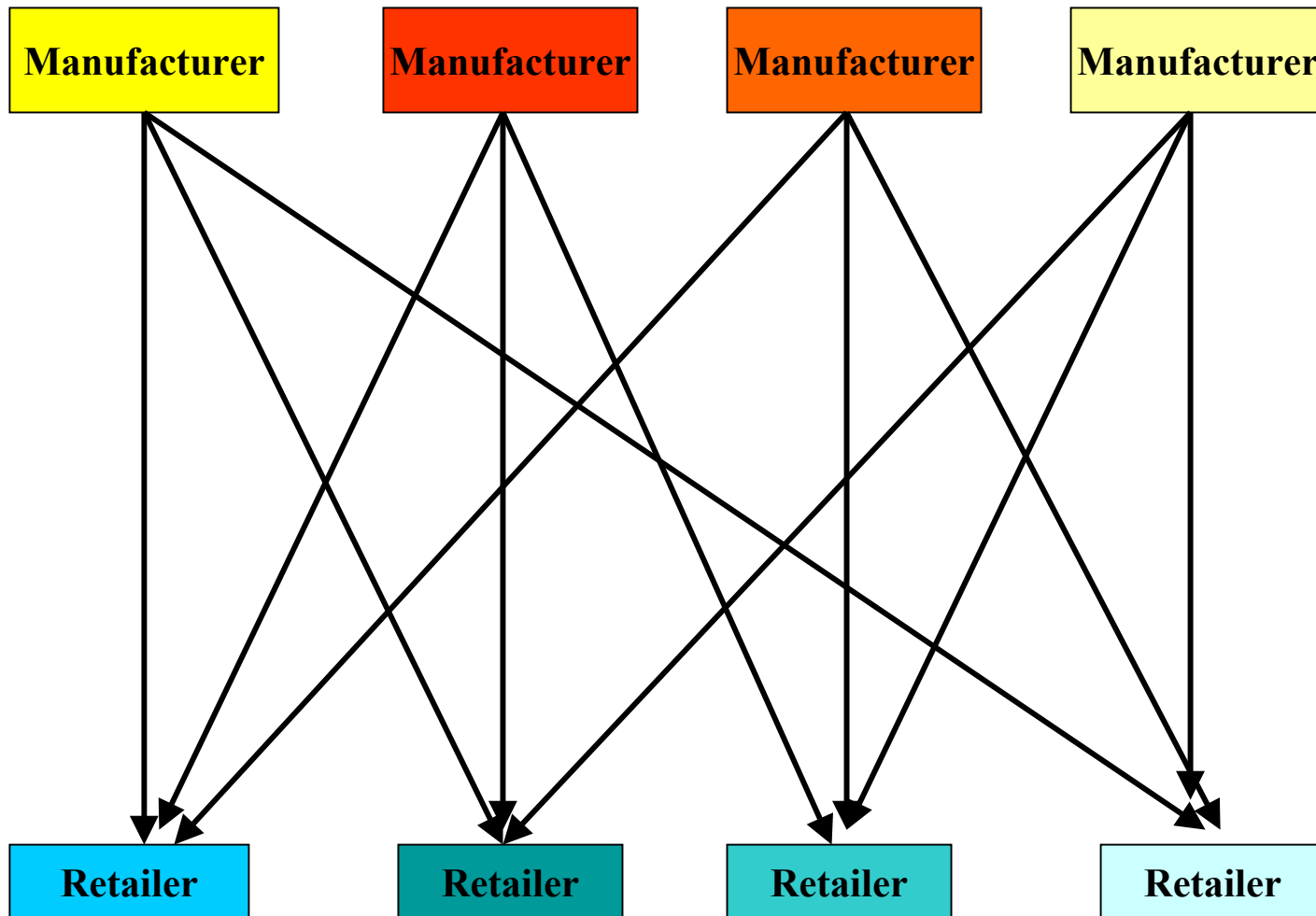
Functions of Marketing Intermediaries

- Inventory Holding
- Risk Bearing
- Assortment Building

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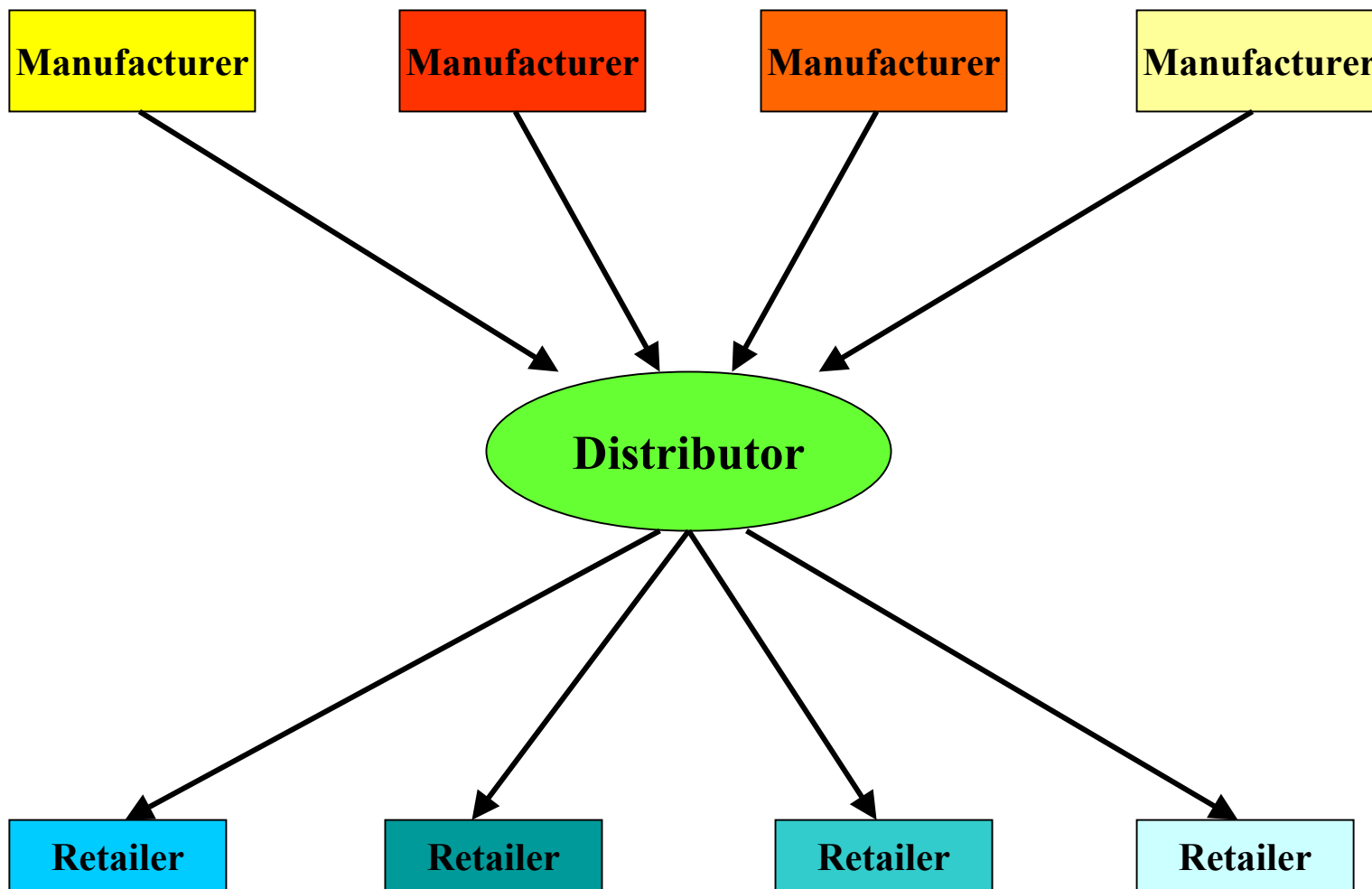
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Role of a Distributor A



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Role of a Distributor B



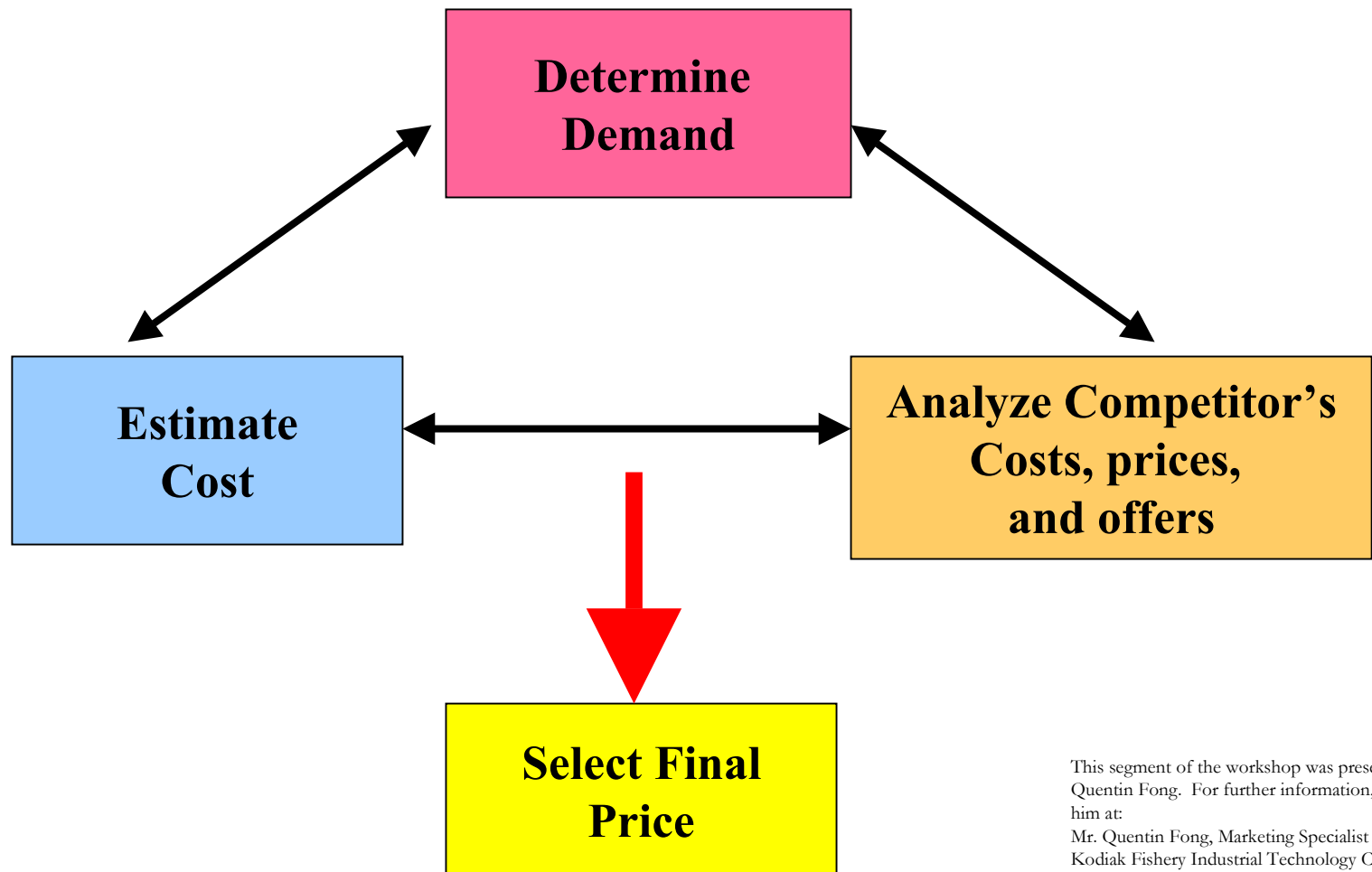
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Price-Quality Relationship

Price

Price			Product Quality
High	Medium	Low	
1. Premium Strategy	2. High-Value Strategy	3. Super-Value Strategy	
4. Overcharging Strategy	5. Medium-Value Strategy	6. Good-Value Strategy	
7. Rip-Off Strategy	8. False Economy Strategy	9. Economy Strategy	Low

Setting Price



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Analyze Competitor's Prices, Costs, and Offers

- Benchmark own costs against competitors
- Learn Price and Quality of Competitor's Offers

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Cost Projections

- The Business Plan
 - Feasibility: determine costs
 - Establish operation
 - GET MONEY!!!

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Business Plan Components

- Business Concept
- Management Capabilities
- Corporate Structure
- Operational/Production Considerations
- Competitive Analysis
- Marketing Plan
- Financial Projections:
 - Sales Forecasts
 - Cost Assessment
- Capitalization Requirements

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Sources and Assistance

Sources

- Alaska Fishermen's Direct Marketing Handbook
- Starting a Processing Operation, Institute of Social & Economic Research

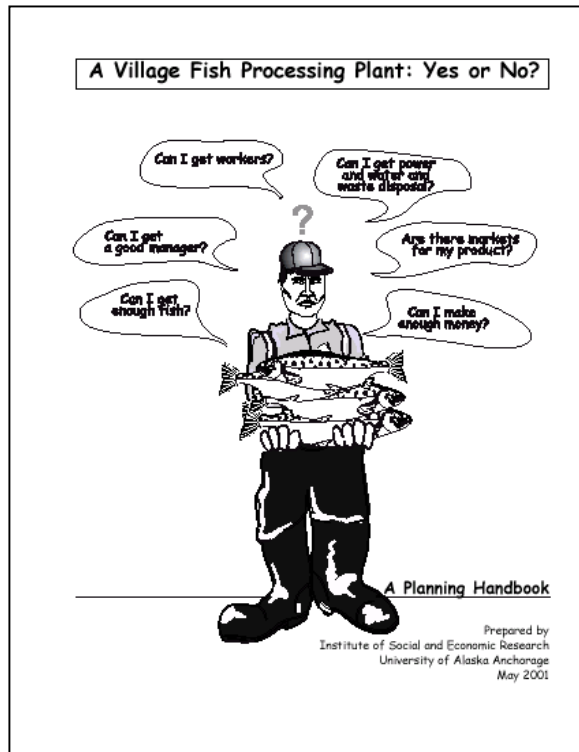
Assistance

- ARDORS
- CDQ corporations
- Local Economic Development Entities
- SBA
- Division of Community & Business Development/DCED
- University of Alaska – Fairbanks
 - FITC
 - MAP

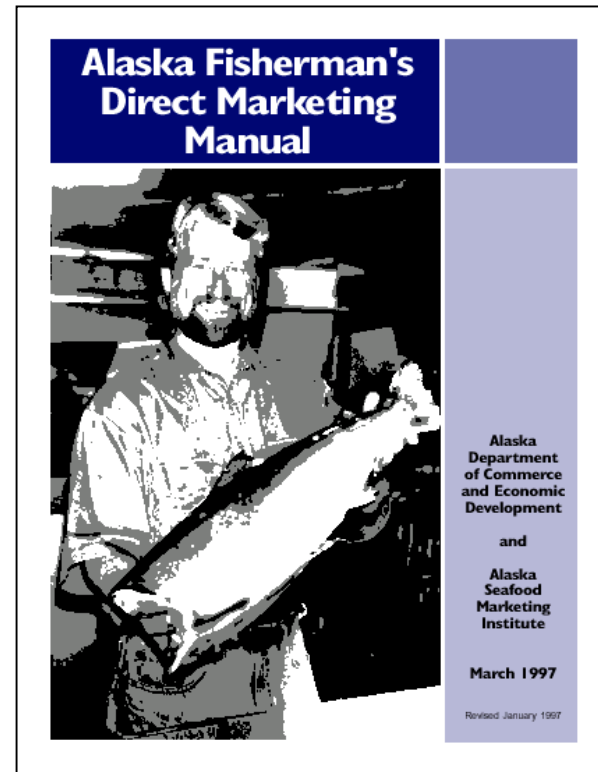
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A couple of handy tools



<http://www.iser.uaa.alaska.edu/ResourceStudies/VillageFishProcessingHandbook/default.htm>



<http://www.dced.state.ak.us/econdev/pub/markman.pdf>

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Creating a Brand

- More than creating a name
- Identify what's most important to the market/barriers to sales
- Differentiate where there is the most value to the buyer or consumer
- Move purchasing decisions beyond price

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Identification vs. Differentiation

Identification

- Gets products on the radar screen
- Attaches a name to a product

Differentiation

- Establishes points of difference
- Can be intrinsic or created

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Western Alaska Salmon Marketing Program

TASTE OUR NATURAL SALMON FROM WESTERN ALASKA WAY OF LIFE®

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Program Goals

- Created by the State of Alaska to develop stable markets for salmon the Arctic Yukon Kuskokwim region
- Decline of traditional markets
- Competition from farmed salmon producers, other less expensive chum, and other protein choices

TASTE OUR NATURAL WAY OF LIFE®
SALMON FROM WESTERN ALASKA

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Program Goals

- Create a regional marketing program
- Focus
 - Create similar market mania as the Copper River
 - Create year round demand
 - Diversify market dependency

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Identifying the Market

- Declining export markets in Japan and Europe
- Domestic market showed some promise in:
 - Foodservice: smaller chains with a story to tell
 - Retail: upscale, but open to frozen salmon
 - Secondary processors: as a source of raw material

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- The Product
 - Differentiate western Alaska chum in a way that no one could dispute
- The Market
 - Check assumptions
 - Define barriers to overcome

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What the Market Wants

- Buyers
 - Consistency in quality and supply
 - A good price for the perceived value
 - For some: A good story
 - Marketing support
- Big problem for buyers: the inconsistent quality of Alaska salmon
- Consumers
 - simple, ready to cook items

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Developing a Product

- A product with desirable intrinsic characteristics
- Consistent supply: combine harvesting areas
- Consistent quality: quality certification program
- A pricing niche that offered a good value compared to farmed salmon and other chums
- A story and a brand
- Promotional incentives

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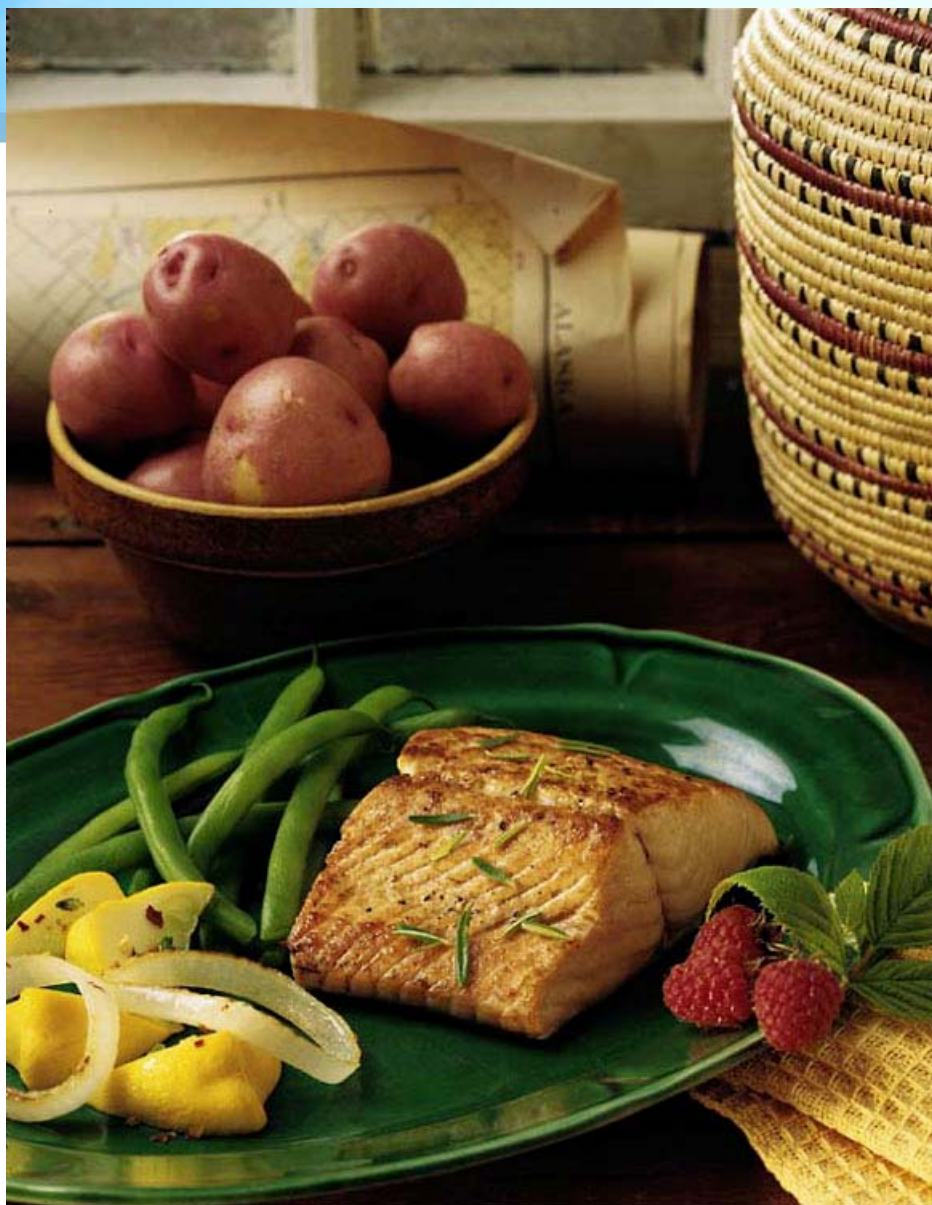
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Arctic Keta® Salmon



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The Western Alaska Story

- Created a story of the natural way of life of the region's people and their salmon.
- Highlighted the story behind the product's quality differentiation
- Created the slogan:

TASTE OUR NATURAL WAY OF LIFE®
SALMON FROM WESTERN ALASKA

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The Quality Story

- Dealt with the quality issue head on
- Developed quality guidelines with the processors and the fishermen
- Created a mandatory quality assurance program with third party inspection

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Building the Arctic Keta Brand

- Build perceived quality
 - Product always meets or exceeds customer expectations
- Building perceived value
 - Consistent quality saves customers money
- Increase brand awareness
 - Introduce to buyer through direct contact, trade shows, advertisements & promotions
- Protect the brand



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Program Elements

- Processor involvement
 - Processors developed quality specifications
 - Processors sign an agreement to participate each year
- Fishermen programs
 - Quality & marketing seminars
 - Icing program
 - MarketFacts radio show and other communication in the region



Program Elements

- Customer development
 - Program managers bring customers to the program
 - Primary and secondary processors bring customers to program
- Promotional programs



Promoting Arctic Keta®

MANUFACTURERS COUPON

Save \$1



Off one 12 oz. package of frozen Orca Bay - Arctic Keta® Salmon



Arctic Keta – a remarkable salmon from an unspoiled place. This new brand of salmon from the Alaska Arctic has a bright orange-red color and a rich flavor that makes it a favorite with salmon lovers everywhere. With Arctic Keta brand you get great salmon in every package.

— LIMIT ONE COUPON PER PURCHASE —

Retailer: Orca Bay Foods will reimburse you the face value of this coupon plus 8¢ if submitted in compliance with our redemption policy. Copies available upon request. Invoices proving sufficient stock must be shown on request. Cash value 1/100 cent. Mail coupon to Orca Bay Foods, Inc., P.O. Box C-389664, Seattle, WA 98138-9664 or an authorized clearinghouse. No other coupon can be used in conjunction with this offer. Void where prohibited.



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Success Stories

- Market driven product development
- Increased primary and secondary processing in the region
- Customer development and promotions
- Increased awareness for the brand and the region



Arctic Keta Salmon

- Identified the right market for our volume and production restrictions
- Capitalized on intrinsic product qualities and created additional points of difference
- Developed strategies to deal with the two negative perceptions of Alaska salmon in the market
 - Quality
 - Consistent supply



Arctic Keta Salmon

- Gave the customer the product form and promotional support that they wanted
- Established a strong brand to protect the investment.





The Arctic Keta Salmon is a high-quality, sustainably sourced product that is perfect for those who appreciate the natural flavors of wild salmon. It is available in a variety of sizes and packaging options to suit your needs.

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Building our Brand

- What are our barriers?
- What are the unique attributes of our product?
- What attributes could we create that would add value to the product?
- What should we call it?
- What should the name and logo say about the product?

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External Communications

- Marketing Communications
- Sales Messages
- Advertising
- Promotions
- Merchandising
- Publicity

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Key Ideas

- Target audience
- Desired result
- Media
- Budget

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Marketing Communications

- Brand story
- Key message development

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Sales Messages

- Should be consistent with marketing messages
- Should be monitored to ensure consistency

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Creating an Ad Strategy

- The promise
- Support for the promise
- Tone of the campaign
- Rationale

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The Advertising Plan

- Communicate with the target audience
 - The media mix
- Audits and other measures
- Budget strategies
 - The “top 2” rule

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Types of Promotions

- Price incentives
- Product incentives
- Merchandise or premiums
- Experiences or events

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Promotional Guidelines

- Set measurable sales goals
- Be time specific
- Target market behavior to:
 - Retaining current users
 - Increasing purchases from current users
 - Increase trial from new users
 - Increase repeat purchases after trial
- Require pre and post-promotion numbers

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Merchandising

- Don't forget your package
 - Add product information, recipes, nutrition info, and your brand story.
- Offer ways to bring more attention to the product in store
 - Shelf talkers
 - Brochures
 - Cross promotions

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- Have to create the story first, before you can tell it.
- Just like your product, it has to offer something new and different to the media
- Product and editorial photos are key to great exposure.

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Marketing Budget

- Should match your goals and target market expectations
- Research costs
- Cost effective choices

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“If I am in business next year, then the business is successful”

This segment of the workshop was presented by Chris Mitchell. For further information, please contact him at:

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Other Possible Measures

Harvesting

- Are fishermen receiving higher prices now?

Quality

- Are you producing more #1s or premium fish now?

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Other Possible Measures

Processing

- Are costs of processing declining?
- Are any specific costs out of control?
- Are yields increasing and rejects declining?
- Is worker turnover declining?

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Other Possible Measures

Marketing

- Are sales and markets growing?
- Tonnage and geographic
- Are interested buyers calling to purchase?
- Number of new customers
- Are my prices increasing? – Premium over market?
- Are you developing a recognizable brand?

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Other Possible Measures

- Which marketing tools result in the most new customers?
- Web hits
- Tradeshow contacts
- Requests for samples
- Growing reputation
- If you're doing V-A products – focus group results

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Systems for Evaluation

- Set up in-house systems to continuously gather such measurements.
- Successful businesses generally take 3~5 years to prove themselves.
- Just surviving till the next season is long way from “making a profit”.

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Recap

- Final questions
- Feedback